



E-Fax User Guide

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Overview

E-Fax lets you reduce the time and money you spend on faxing documents from traditional fax machines. It offers you the convenience of sending, receiving, and managing secure faxes directly from your desktop.

- To use E-Fax you must have a PC that supports Windows Office
- To receive E-faxes all you need is an email account.
- To send E-faxes from your desktop, you must first install the E-Fax client software. Information about how to install E-fax is included as an attachment to the introductory e-mail you received from your DC-Net E-Fax administrator.

Running Fax Utility (FaxUtil)

To open FaxUtil, click the **RightFax** tray icon menu or select **Start > Programs > FaxUtil**.

Creating and Sending Documents

To create a new document to send:

1. Click the **New Document** button. This opens the Fax Information dialog box.
2. In the Fax Information dialog box, add one or more fax or e-mail recipients. Specify your cover sheet notes and options, file and library document attachments, and other sending preferences.
3. Click **Send**.

To send your document to a fax address

1. In the Fax Information dialog box, click the **Main** tab.
2. Enter the recipient's name, fax number, and other contact information. Entries marked in bold are required.

To send your document to an e-mail address or SMS number:

1. In the Fax Information dialog box, click the **Main** tab.
2. Click the arrow next to **Fax Number** and select **E-mail Address** or **SMS Number** on the shortcut menu. Enter the recipient's name, e-mail address or SMS number, and other contact information. Entries marked in bold are required.

Documents sent to e-mail addresses will be sent as file attachments. Documents sent to SMS numbers will only transmit the cover sheet notes.

Selecting an Address from Your Phonebook

To select an address from your phonebook:

1. In the Fax Information dialog box, click the **Main** tab.
2. Click the **Phonebook** button to display all the entries in your RightFax phonebook.
3. Double-click each phonebook entry to which you want to send the document. Each selected address is displayed in the Current Recipients list.
4. Click **OK** to return to the Fax Information dialog box. If you select one phonebook entry, the recipient's addressing information is automatically listed in the addressing boxes. If you select multiple phonebook entries, the total number of recipients is listed in the Name box.

Including a Cover Sheet

To include a cover sheet with your document:

1. In the Fax Information dialog box, click the **Main** tab and select the **Use cover sheet** option.
2. Click the **Cover Sheet Notes** tab.
3. In the Notes box, type any notes that you want added to the cover sheet. You can enter up to 21 lines of text.
4. Click the **More Options** tab.
5. In the Cover Sheet File box, select a cover sheet from the list.
6. In the From boxes, enter the contact information that you want on the cover sheet.

Attaching Library Documents

To attach library documents:

Library documents are frequently-used documents that your fax administrator has stored on the server for easy access. Marketing materials, price lists, and product specifications are commonly stored as library documents.

1. In the Fax Information dialog box, click the **Attachments** tab.
2. Double-click each library document that you want to attach. Each selected attachment is displayed in the Selected Attachments list. Library documents will be added to the end of the document in the order they appear in the Selected Attachments list.

To attach files to your document:

1. In the Fax Information dialog box, click the **Attachments** tab.
2. Click the Browse button to search for the files to attach. Attach as many files as you want. Each selected file is displayed in the Selected Attachments list. File attachments will be added to the end of the document in the order they appear in the Selected Attachments list.

When sending to an e-mail address, you can check the **Native** option in the Selected Attachments list to send an attached file in its native file format, rather than being converted to fax format.

Adding Phonebook Entries

FaxUtil lets you create a personal phonebook of fax and e-mail addresses. You can add both individual entries and group entries that let you easily send one document to multiple recipients. Phonebook entries can be private or published. Private phonebook entries can be viewed only by you. Published phonebook entries can be viewed by any other FaxUtil user on the network.

To create an individual phonebook entry:

1. Click the **Open Phonebook** button in the FaxUtil toolbar.
2. Click **New Entry**.
3. Enter a name for the phonebook entry in the ID box.
4. To create an entry for a fax address, enter the fax number in the Fax Number 1 box, and then complete the remaining address boxes. To create an entry for an e-mail address or SMS number, click the arrow next to Fax Number 1 and select

E-mail Address or SMS Number on the shortcut menu. Enter the e-mail address or SMS number, and then complete the remaining addressing boxes.

5. Check any options you want and click **OK**. The new entry will appear in your phonebook preceded by a Fax Address icon, an E-mail Address icon, or an SMS Number icon.

To create a group phonebook entry:

1. Click the **Open Phonebook** button in the FaxUtil toolbar.
2. Click **New Group**.
3. Enter a name for the group phonebook entry in the ID box.
4. In the list of existing phonebook entries, select each entry you want to add to the new group, and click the **Add to Group** button to move the entry to the Group Members list. You can add both individual phonebook entries and group phonebook entries to the new group.
5. Check any options you want and click **OK**. The new entry will immediately appear in your phonebook preceded by a Group icon.

Forwarding and Routing Documents

When you forward a document from your FaxUtil mailbox, a copy of the document is sent to the recipient and the original document remains in your mailbox. When you route a document, the original document is sent to the recipient and is removed from your mailbox.

To forward a document to a fax number or e-mail address:

1. Select the document to forward and click the **Forward to New Number** button in the toolbar.
2. Complete the addressing boxes in the Fax Information dialog box and click **OK** to send.

To forward a document to another Fax Utility user on your network:

1. Select the document to forward and click the **Forward to User** button in the FaxUtil toolbar. This opens a list of FaxUtil users.
2. Double-click each user that should receive the document and click **OK** to send.

To route a document to another Fax Utility user on your network:

1. Highlight the document to route and click the **Route to User** button in the FaxUtil toolbar. This opens a list of FaxUtil users.
2. Double-click each user that should receive the document and click **OK** to send.

Sorting Documents

To sort documents:

- Click any column header in the document list to sort the documents in that column in ascending order.
- Click the same column header again to sort the documents in that column in descending order.
- Right-click any column header to open a list of filter options.

Viewing Other Users' Mailboxes

RightFax administrators, group administrators, and delegates all have the ability to view the contents of other RightFax users' mailboxes. If you have the ability to view other mailboxes, an Other Users entry is included in your FaxUtil folder tree.

1. Click + next to Other Users in the folder tree to expand the list. The list may include both RightFax groups and individual mailboxes. Continue to expand the tree as necessary until you have listed the folders in the mailbox you want.
2. Click a folder to view its contents.

Viewing Documents

To open the RightFax document viewer, double-click any sent or received document in your document list.

The OCR tab will only appear if you have the Optical Character Recognition (OCR) feature enabled and have performed OCR on this fax. The PDF tab will appear only when viewing sent documents for which you have created portable document format (PDF) output. To view PDF images in FaxUtil, you must have installed Adobe Acrobat Reader version 3.0 or higher.